

2000

OREGON NURSERY

and

GREENHOUSE

SURVEY

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FOREWORD

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It is my pleasure to present the results of the 2000 Oregon Nursery and Greenhouse Survey. Funding for this survey is from USDA's National Agricultural Statistics Service, which was originally secured by the Oregon Congressional delegation at the urging of the Oregon Association of Nurserymen.

This survey provides basic information on the Nursery industry, the leading agricultural industry in Oregon. In fact, this year's and preceding surveys show that the Nursery industry not only leads all Oregon agricultural commodities in the value of production, but has also compiled a record string of increases, having posted annual gains in the value of production each year since 1990, culminating with this year's ten percent increase to \$642 million.

The need for unbiased information in this age of electronic communication is increasing as more individuals and organizations use the data in this bulletin. No other agricultural industry is so thoroughly intertwined with urban society as Oregon's nursery industry. The only unbiased source of the state's nursery statistics, this is the benchmark that all use when analyzing Oregon's green industry. Whether addressing such important issues as the environment or immigration and land use, the data contained herein provide a starting point upon which all data users can agree. However, this doesn't overshadow the impact of the Nursery industry's influence in agricultural policy at all levels of government. The industry's dialogue with Universities, government planners, and state and federal legislatures is based on a thorough knowledge of the industry, including the results of this survey. Input suppliers and producers and marketers of nursery products are also major data users.

This survey would not have been completed without the efforts of the Oregon Association of Nurserymen, Oregon Department of Agriculture and the Oregon Agricultural Statistics Service enumerator staff. We are very appreciative of their support in the data collection and publication of this report.

Sincerely,

Homer K. Rowley
State Statistician

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2000 Nursery Sales up \$58 million from 1999

Oregon’s 2000 nursery sales, at \$642 million, is the highest nursery value ever estimated. During the past two years sales have increased by \$110 million, or 21 percent. This is the tenth consecutive year of record sales. The Nursery and Greenhouse industry again claimed the top ranking of all Oregon commodities, and in fact, was \$223 million above second ranked cattle and calves, valued at \$419 million. All grass seeds, with a value of \$349 million, ranked third and all hay was fourth with a value of \$286 million.

Fifty-two percent of the \$58 million increase in sales came from balled and burlapped plant material and 35 percent of

the increase was from bare root plant material. However, all types of plant material registered gains over 1999.

Clackamas County, with sales of \$148 million was the leading county of sales for the second straight year. Marion County was a close second in sales with \$143 million. Together they produce 45 percent of all nursery and greenhouse sales in Oregon. Washington County ranked third with sales of nearly \$130 million and Yamhill County was fourth at \$103 million.

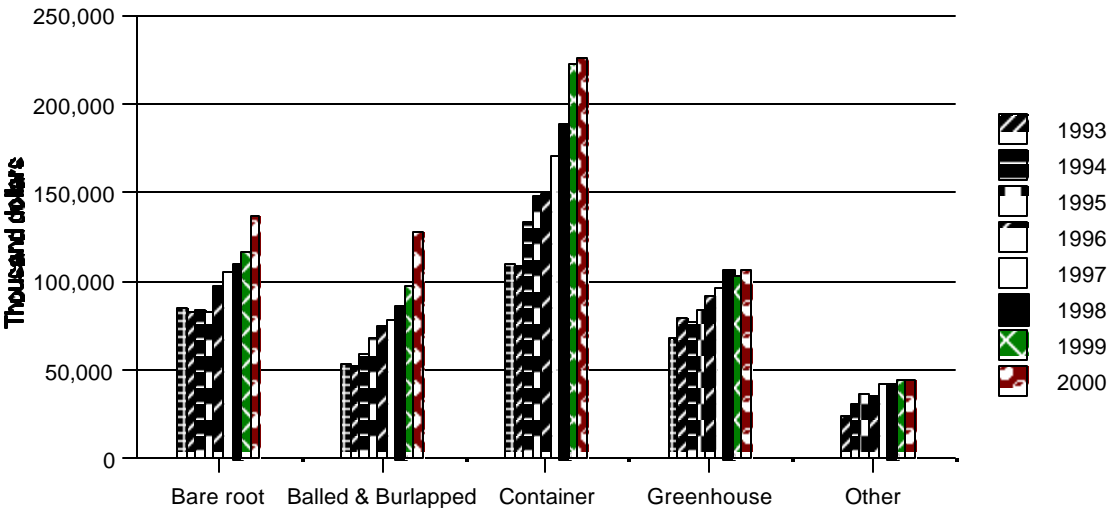
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Oregon nursery/greenhouse gross sales: By plant material 1993 - 2000

Plant material	Gross Sales								<u>2000</u> <u>1999</u>
	1993	1994	1995	1996	1997	1998	1999	2000	
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
Bare Root	82,400	84,300	82,900	97,600	105,400	109,700	116,300	136,700	118
B & B	52,200	58,500	67,800	75,000	77,800	85,500	97,500	127,700	131
Container	108,400	133,900	148,100	148,900	171,300	188,500	223,100	226,300	101
Greenhouse	79,800	77,200	83,500	91,800	95,800	105,900	103,100	106,600	103
Other	24,200	31,100	36,700	34,700	41,700	42,400	44,000	44,700	102
Total	347,000	385,000	419,000	448,000	492,000	532,000	584,000	642,000	110

Oregon nursery/greenhouse gross sales by plant material

Number of operations,

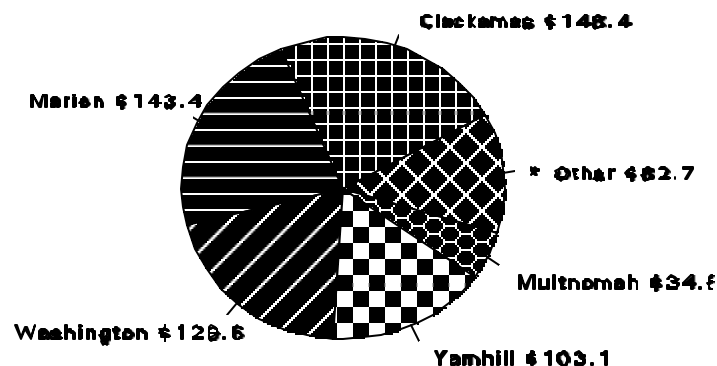


acreage and gross sales by county, 1998 - 2000

County	Number of operations	Acres	Gross Sales			
	2000	1999 ^{1/}	1998	1999	2000	2000/1999
	<i>Number</i>	<i>Acres</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Benton	46	310	1,800	2,030	2,250	111
Clackamas	463	11,950	128,500	143,760	148,350	103
Curry	21	330	3,400	2,770	2,990	108
Deschutes	37	210	1,800	1,950	1,850	95
Douglas	54	490	5,500	5,220	4,690	90
Jackson	67	100	2,300	2,430	2,640	109
Josephine	60	140	2,500	2,530	3,010	119
Klamath	16	920	6,000	8,490	6,430	76
Lane	142	520	13,700	15,090	15,550	103
Lincoln	23	150	2,700	3,140	2,670	85
Linn	83	500	5,200	8,210	8,020	98
Marion	349	9,990	120,000	131,490	143,370	109
Multnomah	199	3,140	32,400	34,790	34,810	100
Polk	43	1,030	6,000	9,740	9,860	101
Umatilla	13	520	3,400	4,130	4,420	107
Washington	235	5,190	97,100	109,410	129,630	118
Yamhill	101	4,530	83,000	84,810	103,115	122
Other ^{2/}	150	1,080	16,700	14,010	18,345	131
Total	2,102	41,100	532,000	584,000	642,000	110

^{1/} Not collected for 2000. ^{2/} Contains counties with less than 1 million dollars of sales or counties which were combined to avoid disclosure.

Nursery/greenhouse gross sales by county, Oregon - 2000 Oregon - \$642 million



* Other: Lane \$15.6 Polk \$9.9 Douglas \$4.7, Linn \$8.0, Klamath \$6.4, Umatilla \$4.4, Curry 3.0, Lincoln \$2.7, Curry \$3.0, Josephine \$3.0, Jackson \$2.6, Benton \$2.3, Deschutes \$1.9, Other Misc. Counties \$18.3.

Oregon gross sales, by sales value, 1996 - 2000

Sales size group	Gross sales					
	1996	1997	1998	1999	2000	<u>2000</u> 1999
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Less than \$20,000	6,700	8,700	7,600	7,200	8,800	122
\$20,000 - \$99,999	18,100	18,500	17,500	15,000	15,800	105
\$100,000 - \$199,999	18,900	20,000	19,600	17,600	14,600	83
\$200,000 - \$499,999	36,000	38,500	44,700	38,500	37,900	98
\$500,000 - \$1,999,999	121,500	134,300	135,900	125,500	130,200	104
More than \$2,000,000	246,800	272,000	306,700	380,200	434,700	114
Total	448,000	492,000	532,000	584,000	642,000	110

2000 Data Collection

The 2000 Oregon Nursery and Greenhouse Survey was designed to collect data on all commercial nurseries, greenhouses, and producers of other plant material, such as roses, holly, bulbs, sod, cut flowers, dried flowers, etc. in the state. A stratified random sample of 712 names was chosen from the Oregon Department of Agriculture list of licensed nurseries and greenhouses for 2000. They were classified into six broad size groups based on sales volume. The Oregon Agricultural Statistics Service floriculture survey was used to supplement the list for those firms in the industry who are not required to have a State license, such as Holly growers.

Questionnaires were mailed to sampled names on June 12, 2001, followed by a second request on June 26, 2001. All non-respondents were phoned or visited during the period July 18 to July 31. Cooperation was good with 92 percent of the sampled names cooperating.

The sample design was developed by the National Agricultural Statistics Service. Computer editing and summary programs were written by Kent Hoddick. Data for minor counties and items were combined with other totals to avoid disclosure of individual operations.

Number of operations and survey sampling 1999 & 2000

Sales size group	Number of operations		Operations in sample	
	1999	2000	1999	2000
Less than \$20,000	1,395	1,324	161	150
\$20,000 - \$99,999	356	343	113	127
\$100,000 - \$199,999	121	103	121	103
\$200,000 - \$499,999	116	126	116	126
\$500,000 - \$1,999,999	135	137	135	137
More than \$2,000,000	62	69	62	69
Total	2,185	2,102	708	712

Number of workers employed in the nursery/greenhouse industry and gross wages paid - 1999 ^{1/}

Sales size group	Full time	Seasonal	Total workers	Total wages	Average wages per worker
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Dollars</i>	<i>Dollars</i>
Less than \$20,000	50	1,400	1,450	820,000	566
\$20,000 - \$99,999	200	750	950	3,840,000	4,042
\$100,000 - \$199,999	300	900	1,200	5,675,000	4,729
\$200,000 - \$499,999	650	1,000	1,650	12,980,000	7,867
\$500,000 - \$1,999,999	1,900	2,900	4,800	45,555,000	9,491
More than \$2,000,000	5,900	5,250	11,150	132,300,000	11,865
Total	9,000	12,200	21,200	201,170,000	9,489

^{1/} Not collected for 2000.

Number of workers, wages and number of operations, Oregon, 1993, 1995, 1997, 1999 ^{1/}

	1993	1995	1997	1999	<u>1999</u> <u>1997</u>
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Percent</i>
Seasonal workers	12,350	12,235	12,750	12,200	96
Full time workers	6,850	7,250	8,050	9,000	112
Total workers	19,200	19,485	20,800	21,200	102
Total wages (\$)	124,173,000	146,482,000	178,870,000	201,170,000	112
Average wages per worker (\$)	6,467	7,518	8,600	9,489	110
Number of operations	1,986	1,905	2,040	2,185	107

^{1/} Not collected for 2000.

Destination of gross sales by Oregon plant material, 1991, 1995, 1999 ^{8/}

Destination	Plant material type								
	Bare root			B & B			Container		
	1991	1995	1999	1991	1995	1999	1991	1995	1999
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>
Oregon	20,040	19,420	20,610	11,530	15,690	18,560	19,790	30,240	42,280
Washington	11,740	8,185	8,480	9,390	8,850	9,850	13,880	15,090	25,860
California	5,150	4,625	6,390	3,070	2,346	4,060	5,740	8,150	16,900
Other western States ^{1/}	4,460	3,225	4,670	6,780	8,085	8,560	11,520	13,080	25,510
Upper Midwest ^{2/}	22,390	20,130	21,560	7,150	9,490	15,160	21,590	31,620	36,060
Gulf States ^{3/}	3,850	4,800	4,690	830	1,315	2,680	2,990	3,660	6,450
Atlantic States ^{4/}	5,740	9,375	24,400	5,070	5,937	12,860	8,690	11,300	30,950
Northeast States ^{5/}	13,050	9,345	21,050	8,610	13,450	21,900	14,670	24,110	33,160
Western Canada ^{6/}	2,540	2,070	2,770	2,190	1,654	1,750	4,940	6,260	3,210
Eastern Canada ^{7/}	4,250	845	1,220	2,260	760	2,120	2,700	4,260	2,440
Foreign Countries	20	880	460	30	223	--	60	330	280
Total	93,230	82,900	116,300	56,910	67,800	97,500	106,570	148,100	223,100

1/ Other western States include MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

2/ Upper Midwest include ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY. 3/ Gulf States include OK, TX, AR, LA, TN, MS, AL.

4/ Atlantic States include MD, DE, WV, VA, NC, SC, GA, FL.

5/ Northeast States include ME, NH, VT, MA, CT, RI, NY, PA, NJ.

6/ Western Canada include BC, AB, SK, MB.

7/ Eastern Canada includes all other provinces.

8/ Not collected for 2000.

Destination of gross sales by Oregon plant material, 1991, 1995, 1999 ^{8/} (continued)

Destination	Plant material type									1999 1995	Percent of total sales by destination
	Greenhouse			Other			Total				
	1991	1995	1999	1991	1995	1999	1991	1995	1999		
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent	Percent
Oregon	35,060	47,415	60,680	5,840	13,670	17,450	92,260	126,435	159,580	126	27.3
Washington	7,810	11,275	14,920	2,750	4,010	2,320	45,570	47,410	61,430	130	10.5
California	5,430	10,160	9,700	3,310	5,630	9,670	22,700	30,911	46,720	151	8.0
Other western States ^{1/}	1,720	1,710	2,150	980	1,140	1,030	25,460	27,240	41,920	154	7.2
Upper Midwest ^{2/}	2,780	4,325	3,680	4,790	3,350	2,810	58,700	68,915	79,270	115	13.6
Gulf States ^{3/}	1,310	1,600	2,030	1,430	1,900	1,890	10,410	13,275	17,740	134	3.1
Atlantic States ^{4/}	1,120	1,475	3,260	2,500	4,020	2,750	23,120	32,107	74,220	231	12.7
Northeast States ^{5/}	1,000	2,150	3,350	3,270	2,320	2,290	40,600	51,375	81,750	159	14.0
Western Canada ^{6/}	1,060	2,015	2,060	280	450	360	11,010	12,449	10,150	82	1.7
Eastern Canada ^{7/}	810	1,025	1,090	230	180	690	10,250	7,070	7,560	107	1.3
Other Foreign Countries	70	350	180	740	30	2,740	920	1,813	3,660	202	.6
Total	58,170	83,500	103,100	26,120	36,700	44,000	341,000	419,000	584,000	139	100

1/ Other western States include MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

2/ Upper Midwest include ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY.

3/ Gulf States include OK, TX, AR, LA, TN, MS, AL.

4/ Atlantic States include MD, DE, WV, VA, NC, SC, GA, FL.

5/ Northeast States include ME, NH, VT, MA, CT, RI, NY, PA, NJ.

6/ Western Canada include BC, AB, SK, MB.

7/ Eastern Canada includes all other provinces.

8/ Not collected for 2000.

(continued from page 1)

Production appears to be shifting to Washington and Yamhill Counties as combined sales were up 20 percent from 1999. The top four counties accounted for 82 percent of all production, compared with 80 percent a year earlier. The number of firms growing nursery and greenhouse products in Oregon during 2000 was 2,102, which compares with 2,185 firms in 1999.

A review of sales by the size of firms shows that smaller firms (annual sales under \$100,000) and the largest firms

(sales over \$500,000) increased their sales over last year. Conversely, firms with annual sales of between \$100,000 and \$500,000 had lower sales from 1999. The greatest increase in sales came from the largest firms (more than \$2.0 million annual sales), whose sales increased by \$54.5, million, or 14 percent, over 1999. These firms accounted for all but \$3.5 million of the total increase in nursery sales. There were 69 firms in this category, up 7 firms from a year earlier.

Number of operations by sales value, 1994 - 2000

Sales size group	Number of Operations						
	1994	1995	1996	1997	1998	1999	2000
Less than \$20,000	1,310	1,186	1,258	1,292	1,342	1,396	1,324
\$20,000 - \$99,999	319	344	324	341	337	356	343
\$100,000 - \$199,999	126	118	125	131	129	121	103
\$200,000 - \$499,999	98	117	113	111	113	116	126
\$500,000 - \$1,999,999	94	102	122	125	118	135	137
More than \$2,000,000	32	38	41	40	43	62	69
Total	1,979	1,905	1,983	2,040	2,082	2,185	2,102